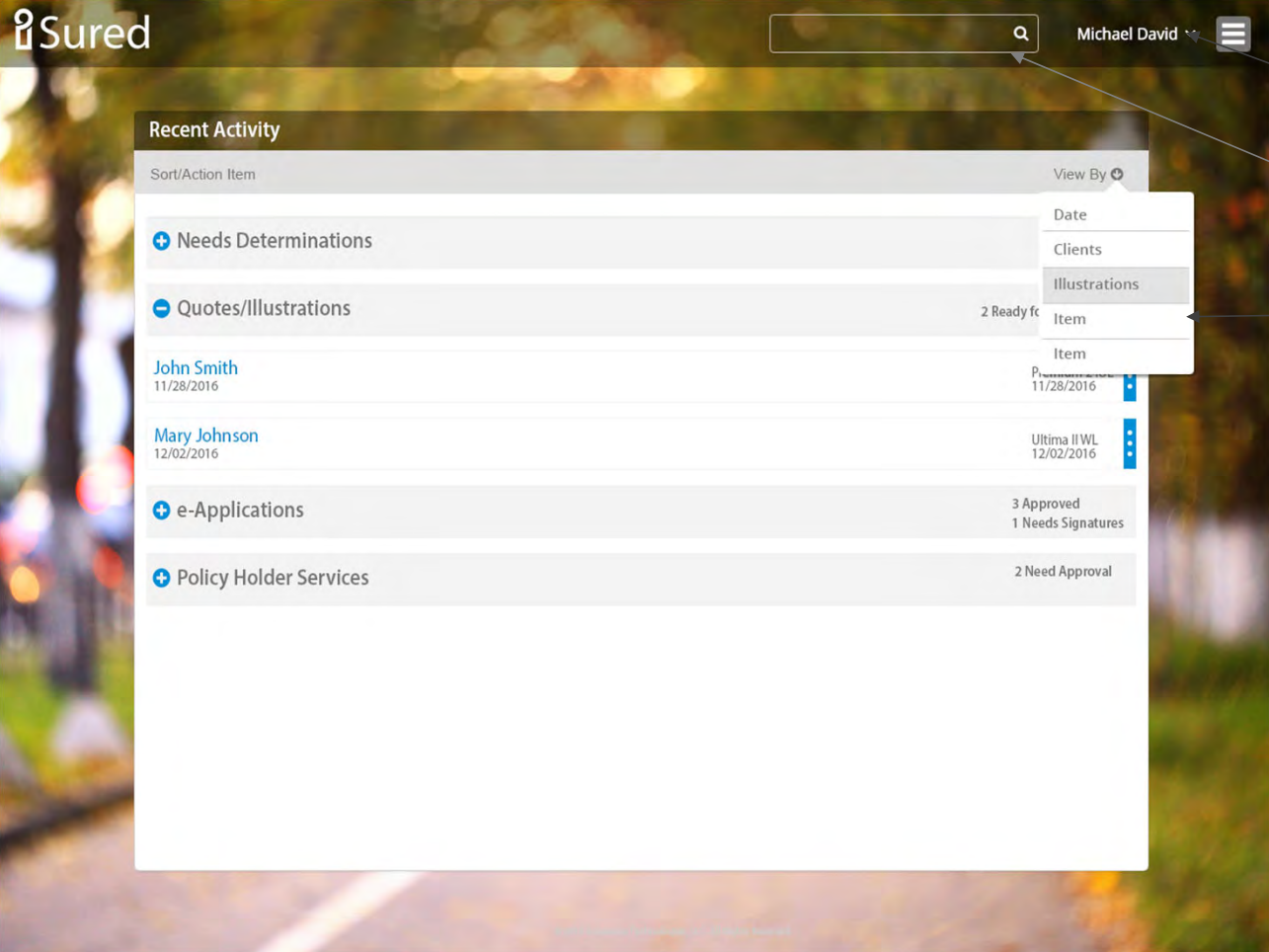


# FL Framework – Dashboard



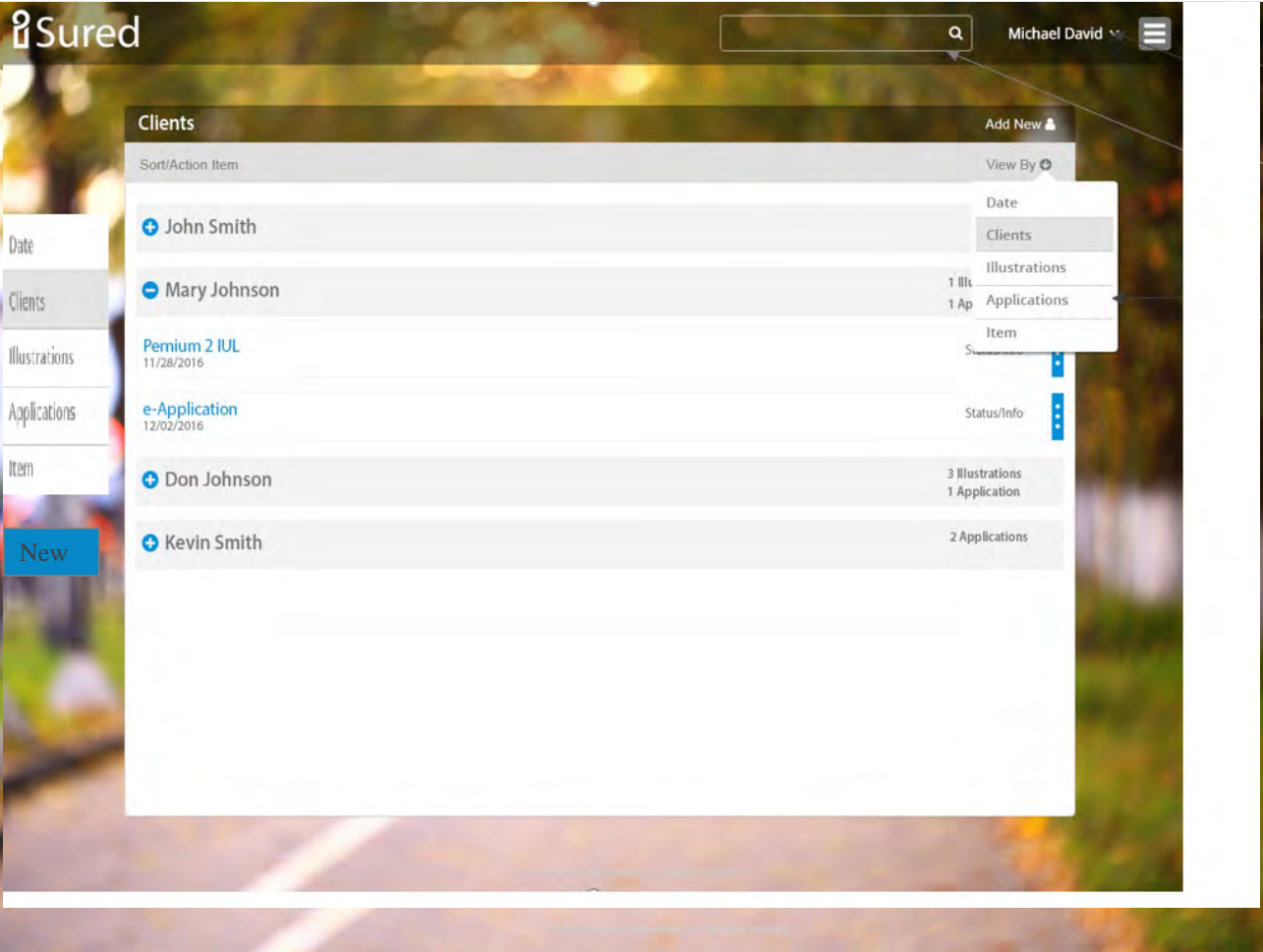
Main menu – Dashboard, New App, Quote/Illustration, Help, Sign Out

User menu – Preferences, etc.

Platform Search

'View By' menu

# FL Framework – Dashboard



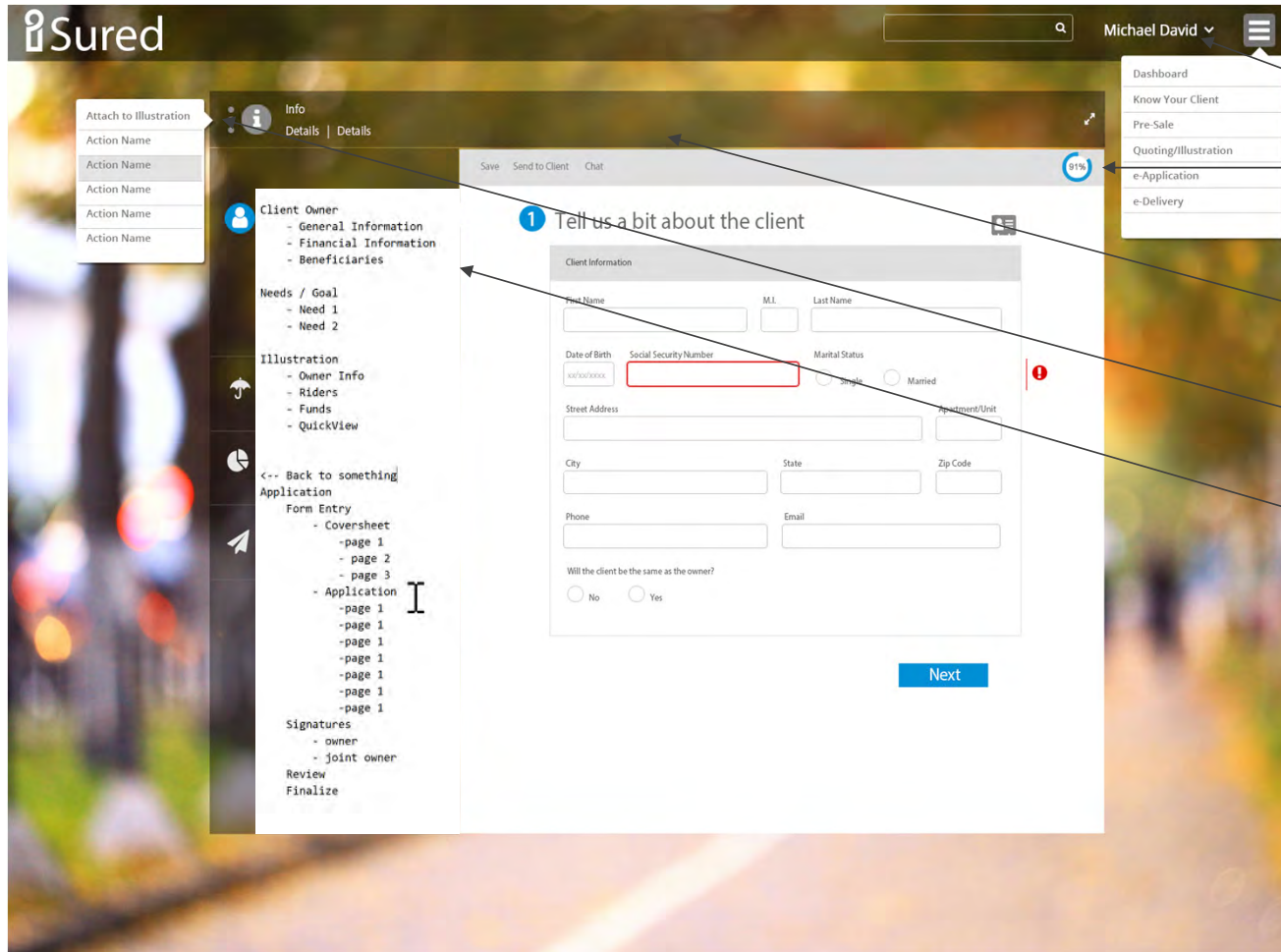
Main menu – Dashboard, New App, Quote/Illustration, Help, Sign Out

User menu – Preferences, etc.

Platform Search

'View By' menu

# FL Framework – Navigation (Client)



Main menu – Dashboard, New App, Quote/Illustration, Help, Sign Out

User menu – Preferences, etc.

Top portion for form functions – Save, Chat, Send to Client, Form Entry %

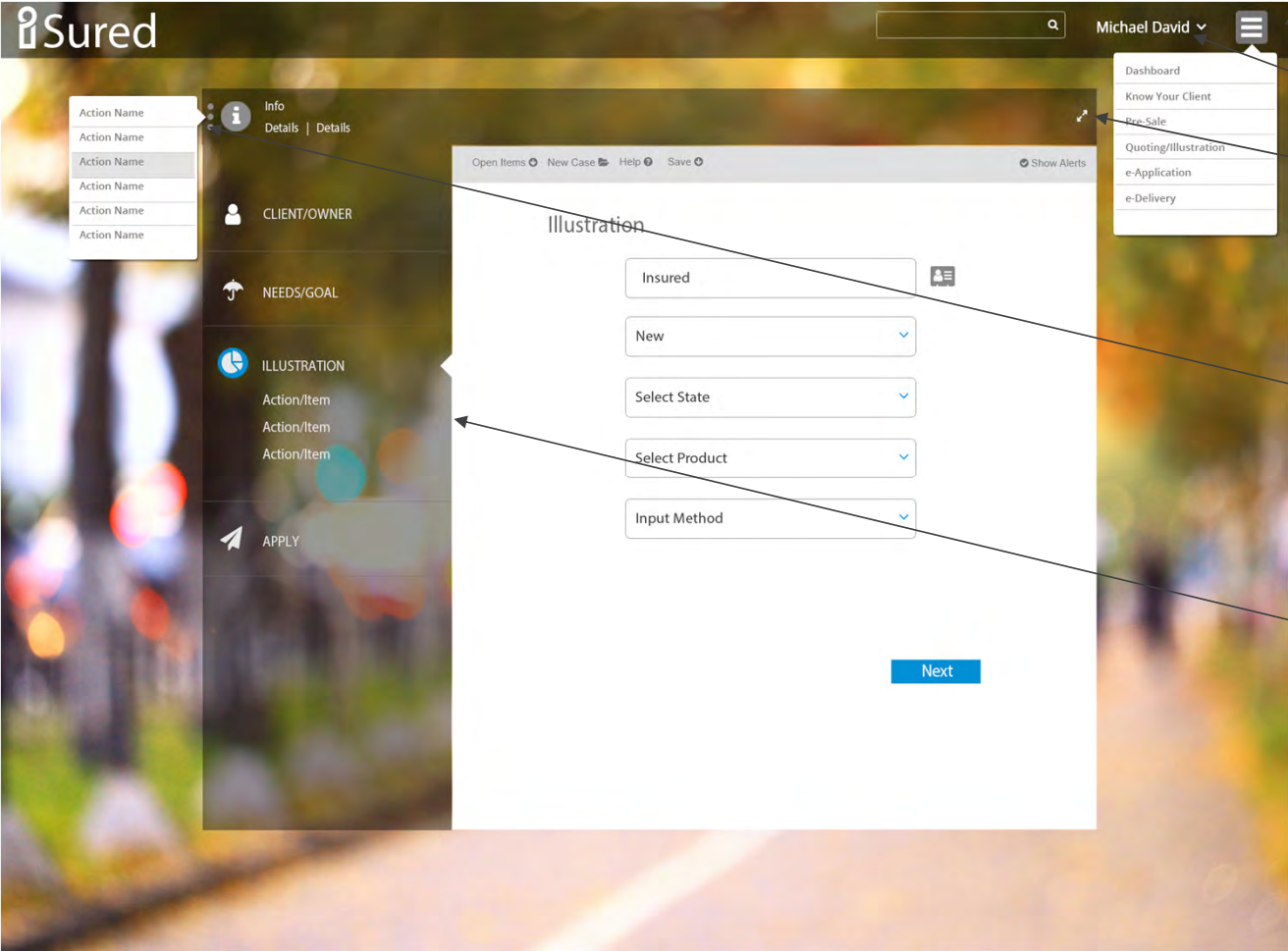
Subway to indicate Stage/Module

'Case' Actions menu

Component (Module) navigation and status (if applicable)

With Actions/Items if Needed for Component

# FL Framework – Illustrations



Main menu – Dashboard, New App, Quote/Illustration, Help, Sign Out

User menu – Preferences, etc.

Expand View (see next screen)

'Case' Actions menu – pull diff illustration, etc...

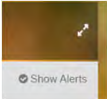
Component (Module) navigation and status (if applicable)

With Actions/Items if Needed for Component

# FL Framework –Illustrations (expanded view)

The screenshot displays the Sured application interface. At the top left is the Sured logo. The top navigation bar includes a search icon, the user name 'Michael David', and a menu icon. A dropdown menu is open, listing: Dashboard, Know Your Client, Pre-Sale, Quoting/Illustration, e-Application, and e-Delivery. The left sidebar contains navigation items: Info (Details | Details), CLIENT/OWNER, NEEDS/GOAL, ILLUSTRATION (with sub-items: Action/Item, Action/Item, Action/Item), and APPLY. The main content area is titled 'Illustration' and contains a form with the following fields: 'Insured' (text input), 'New' (dropdown), 'Select State' (dropdown), 'Select Product' (dropdown), and 'Input Method' (dropdown). A blue 'Next' button is located at the bottom center of the form area.

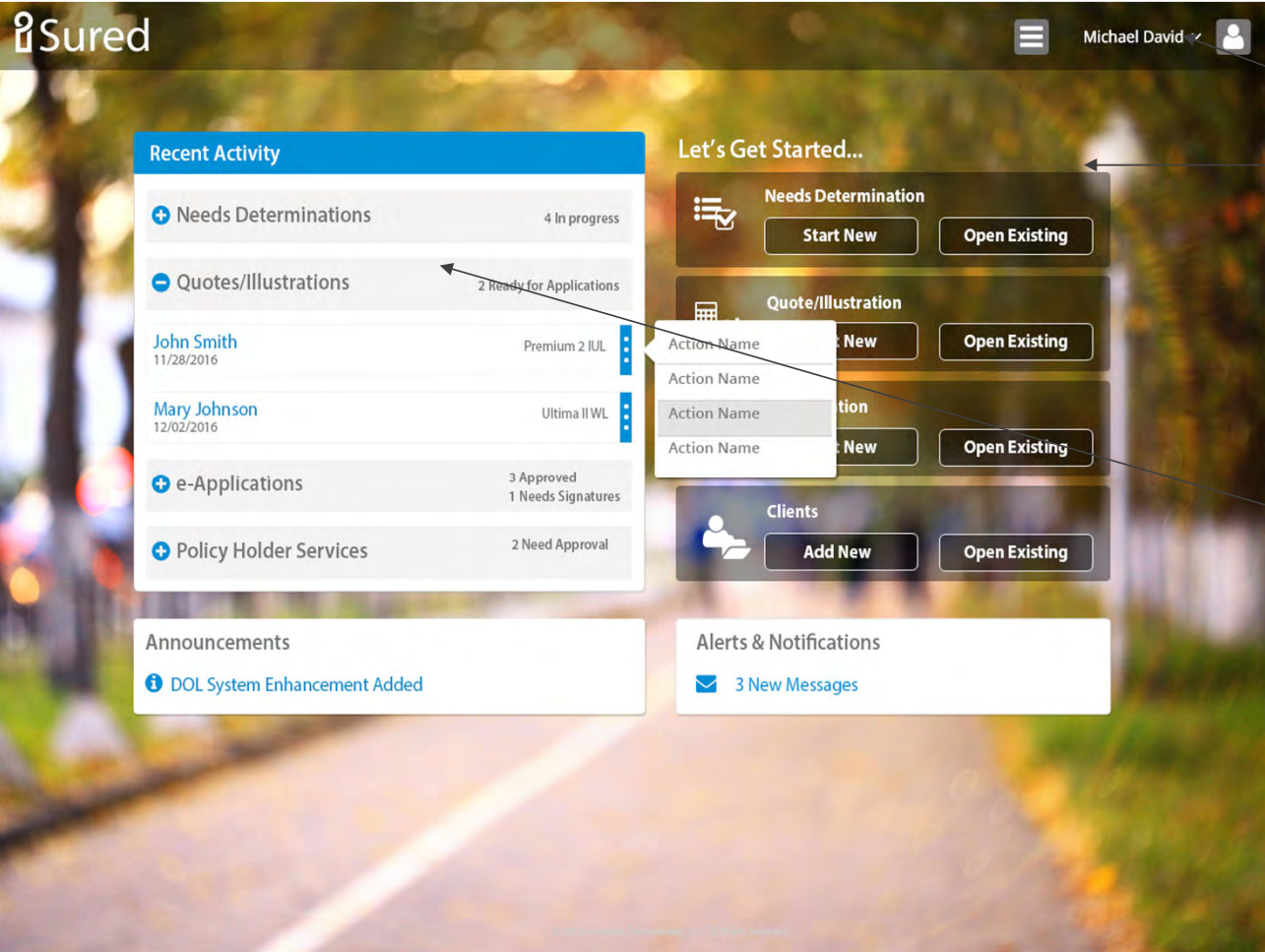
Toggle for expand view



# FL Framework v2

Following slides presented for FI UI framework – version 2

# FL Framework – Dashboard



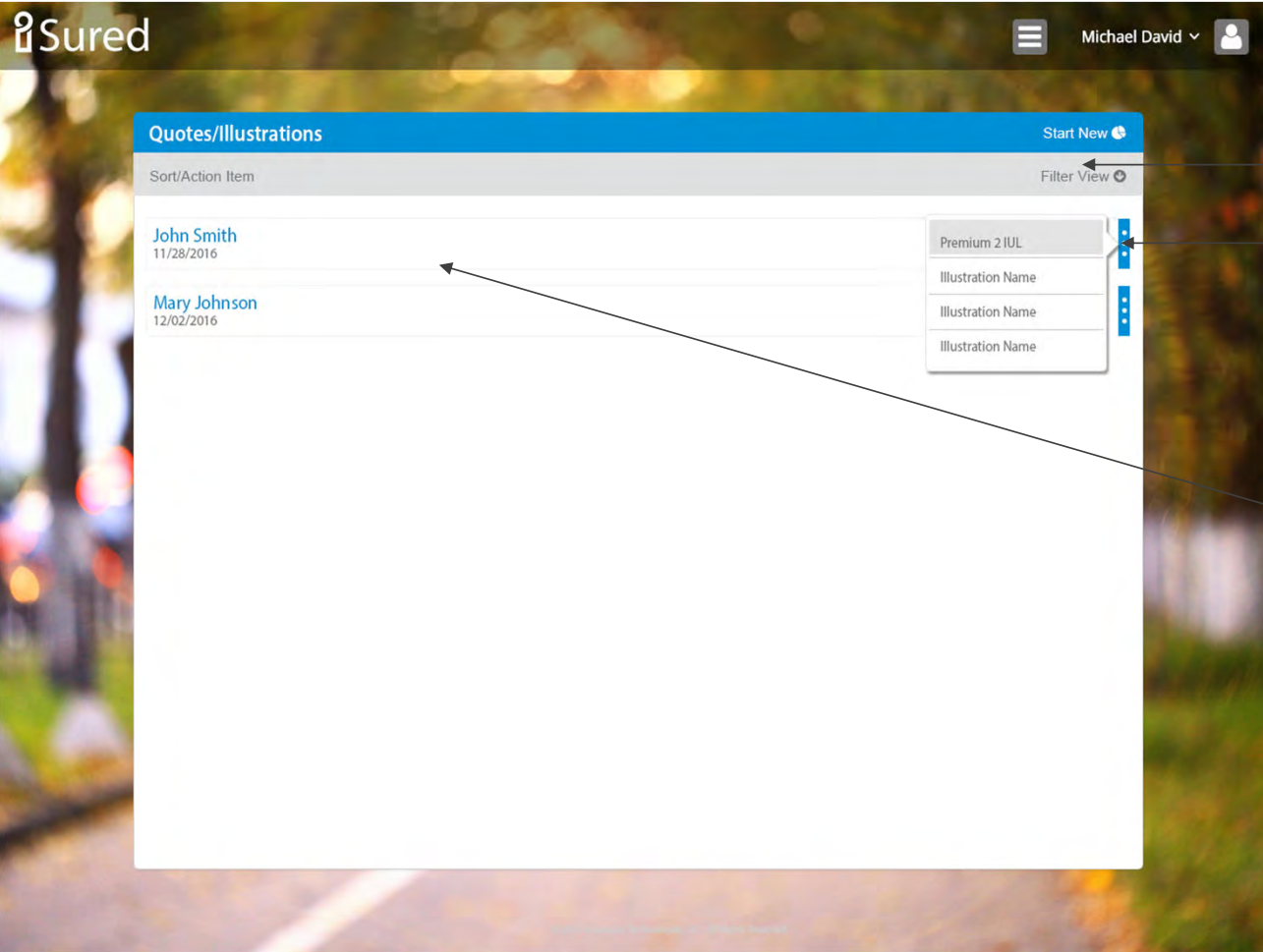
Main menu – Dashboard, New App, Quote/Illustration, Help, Sign Out

User menu – Preferences, etc.

Navigation to Main Components

Recent Activity Overview

# FL Framework – Component Dashboard



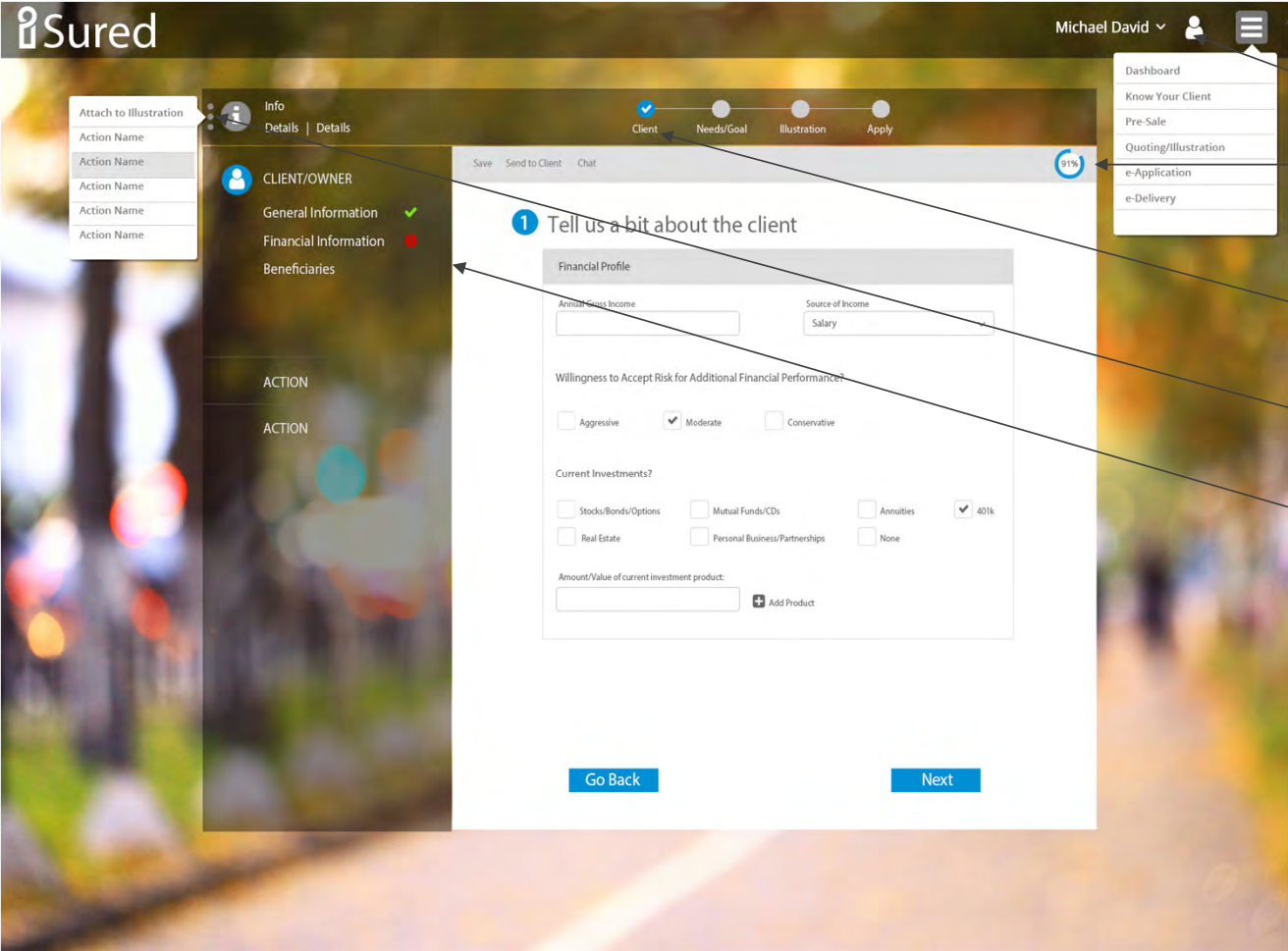
Filter/View Actions

Case Action Menu

Cases Listed by View



# FL Framework – Navigation (Client)



Main menu – Dashboard, New App, Quote/Illustration, Help, Sign Out

User menu – Preferences, etc.

Top portion for form functions – Save, Chat, Send to Client, Form Entry %

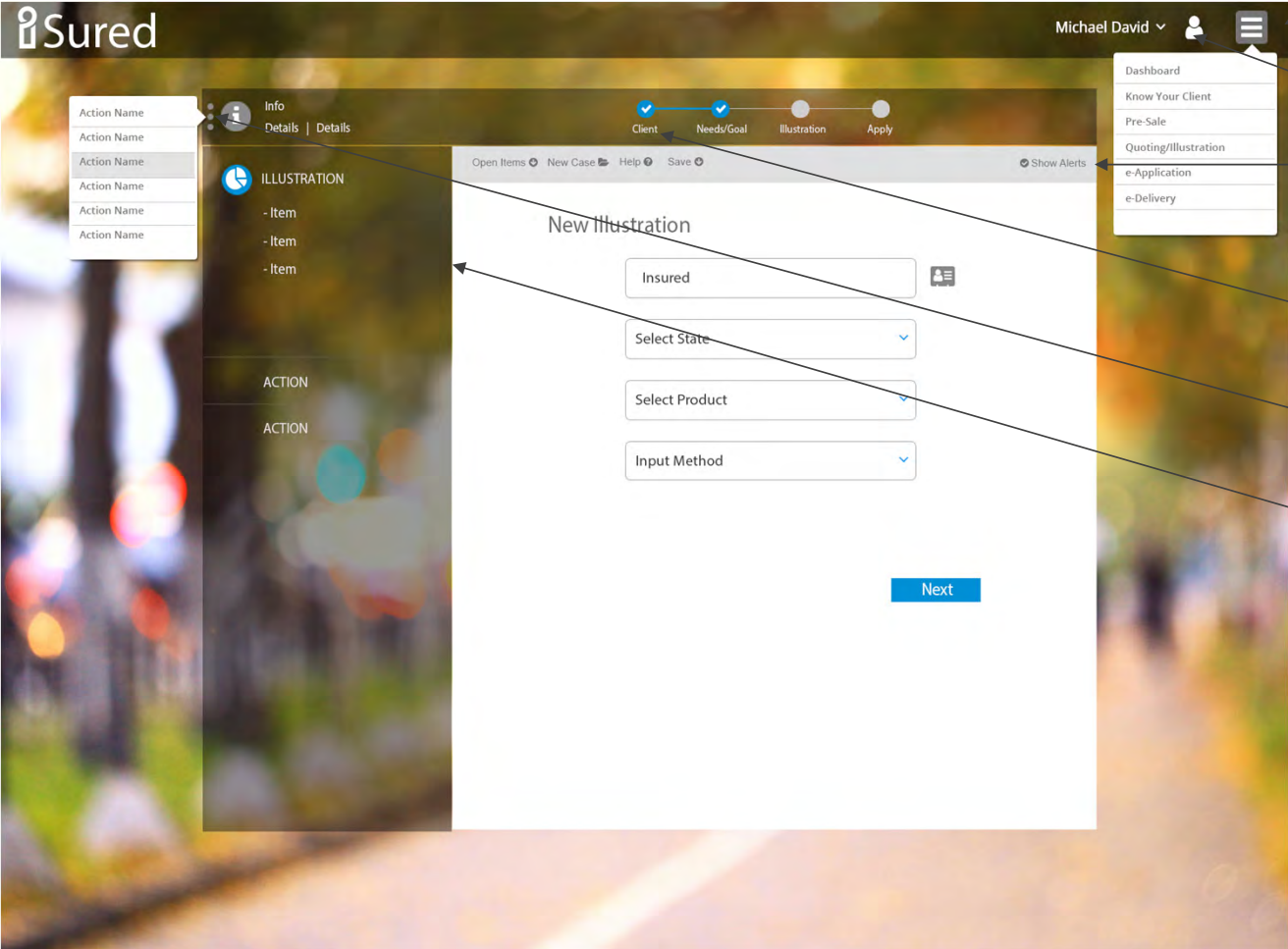
Subway to indicate Stage/Module

'Case' Actions menu

Component (Module) navigation and status (if applicable)

With Actions/Items if Needed for Component

# FL Framework – Illustrations



Main menu – Dashboard, New App, Quote/Illustration, Help, Sign Out

User menu – Preferences, etc.

Top portion for form functions – Save, Chat, Send to Client, Form Entry %

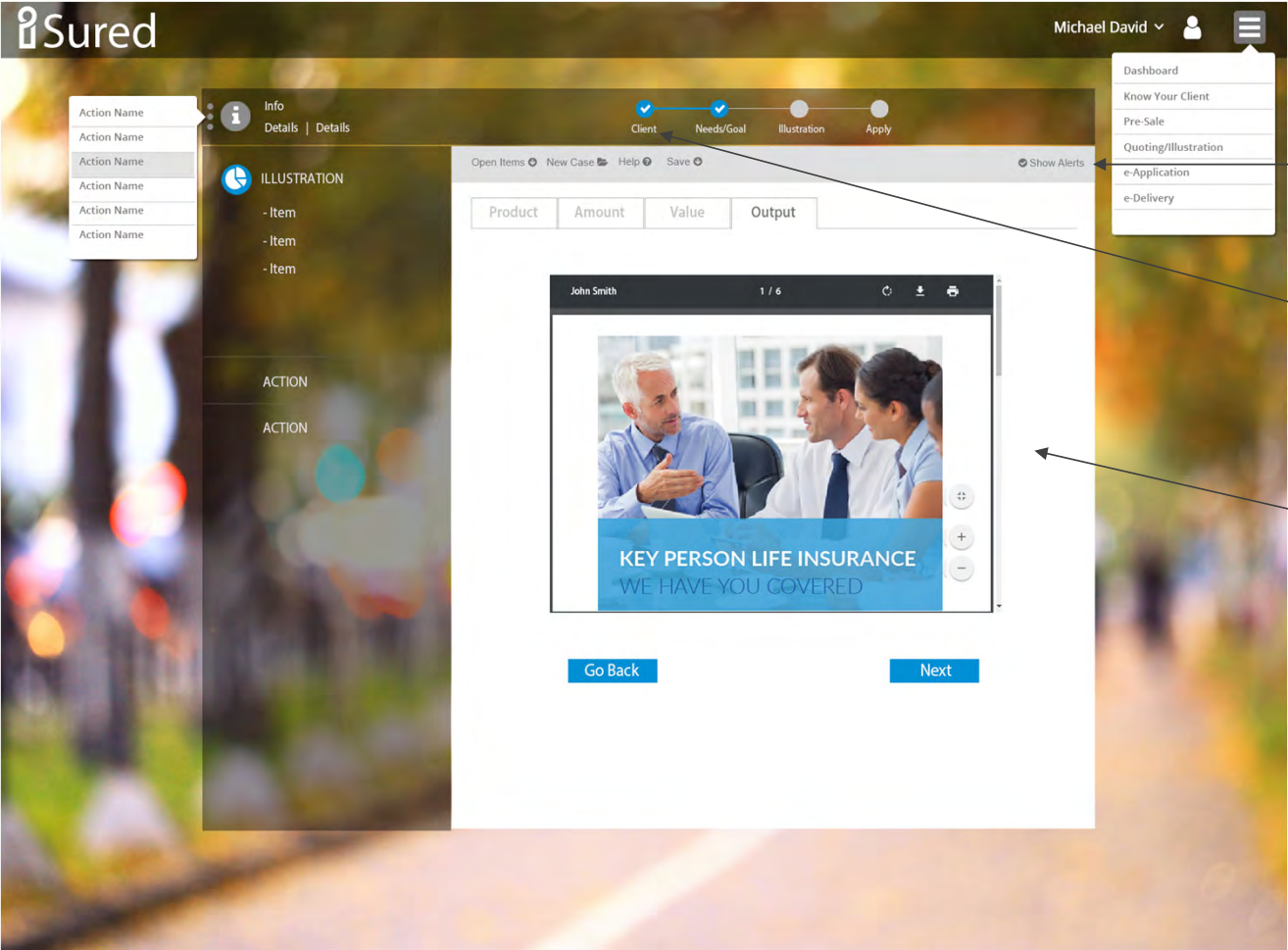
Subway to indicate Stage/Module

'Case' Actions menu

Component (Module) navigation and status (if applicable)

With Actions/Items if Needed for Component

# FL Framework – Illustrations



Top portion for form functions – Save, Chat, Send to Client, Form Entry %

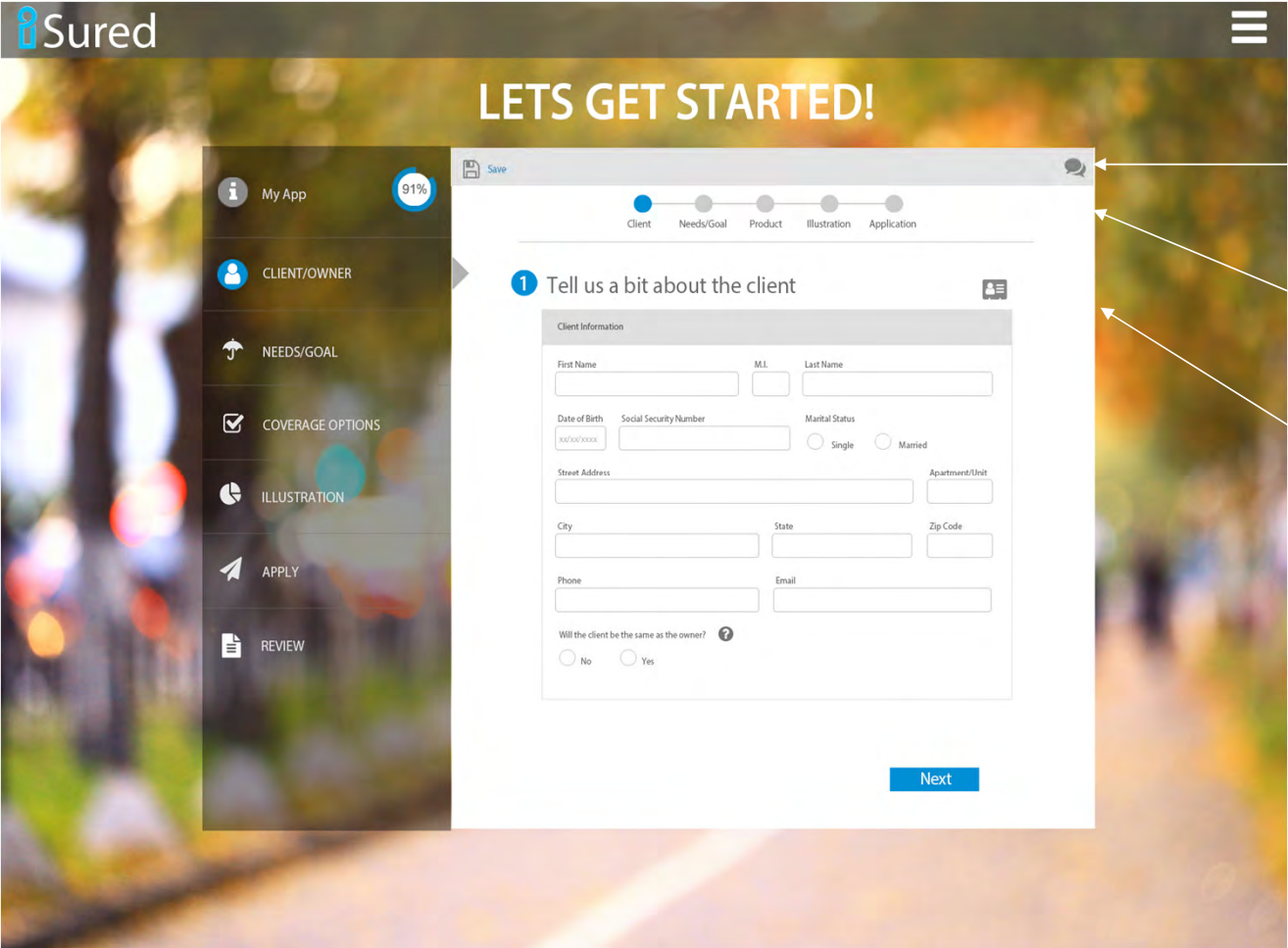
Subway to indicate Stage/Module

Component (Module) Workspace Changes per Input/Output Display

# FL Framework v1

Following slides presented for FI UI framework – version 1

# FL Wizard – Navigation



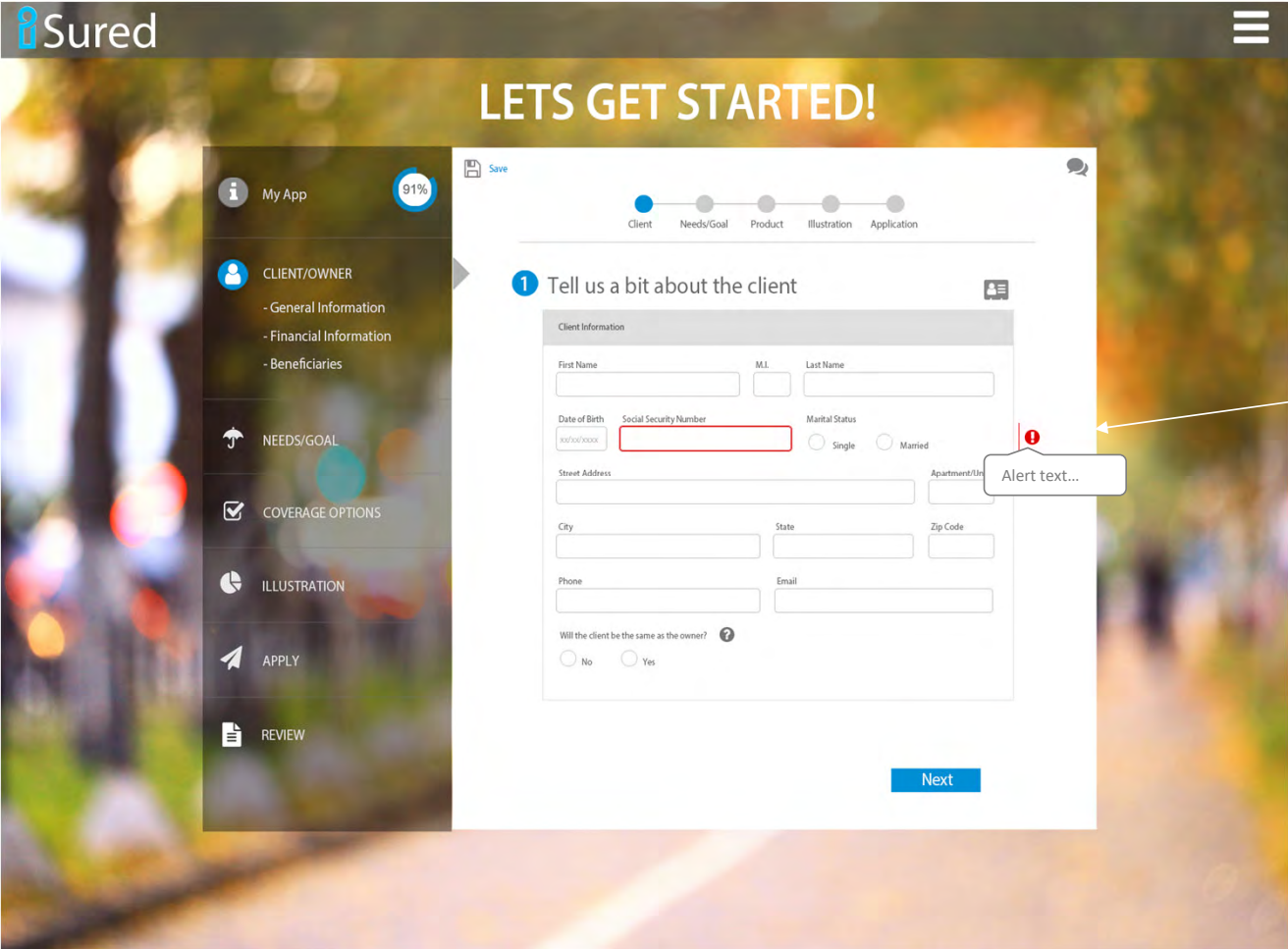
Main menu – Dashboard, New App, Quote/Illustration, Preferences, Help, Other

Top portion for form functions – Save, Chat, Send to Client, etc.

Subway to indicate stage

Click/Tap Client Contact icon to add existing client from CRM

# FL Wizard – Navigation



Alerts shown in progress – Can't go to Next until resolved. Click/tap on alert symbol displays alert text.

Menu on left expands on SECTION click/tap to display areas below

# FL Wizard – Navigation

**Sured**

## LETS GET STARTED!

91%

Client Needs/Goal Product Illustration Application

**1 Tell us a bit about the client**

Client Information

First Name M.I. Last Name

Date of Birth Social Security Number Marital Status

Street Address Apartment/Unit

City State Zip Code

Phone Email

Will the client be the same as the owner?

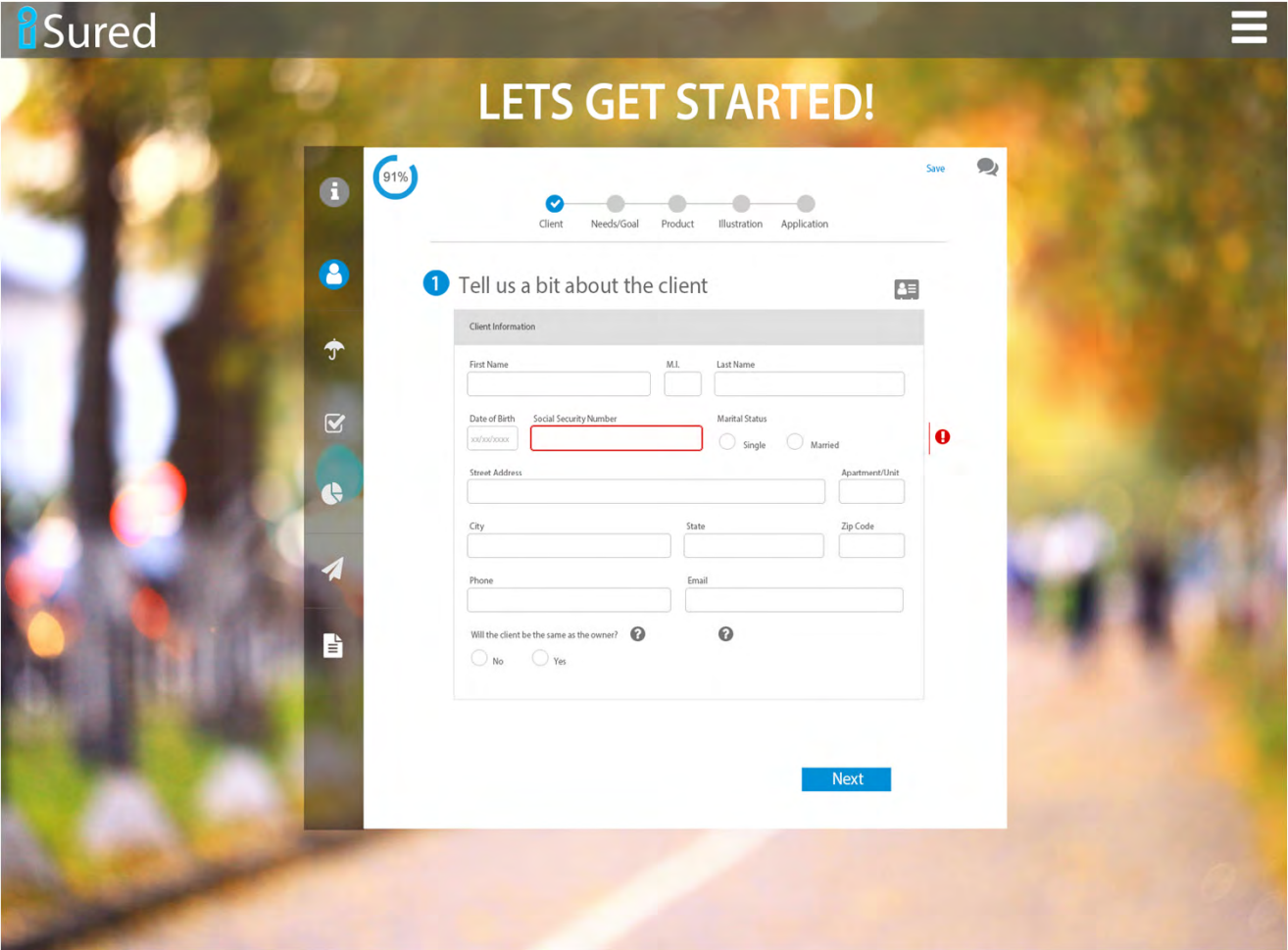
No Yes

Next

Possible alternate placement of App status.

App info above left nav updates as info changes.

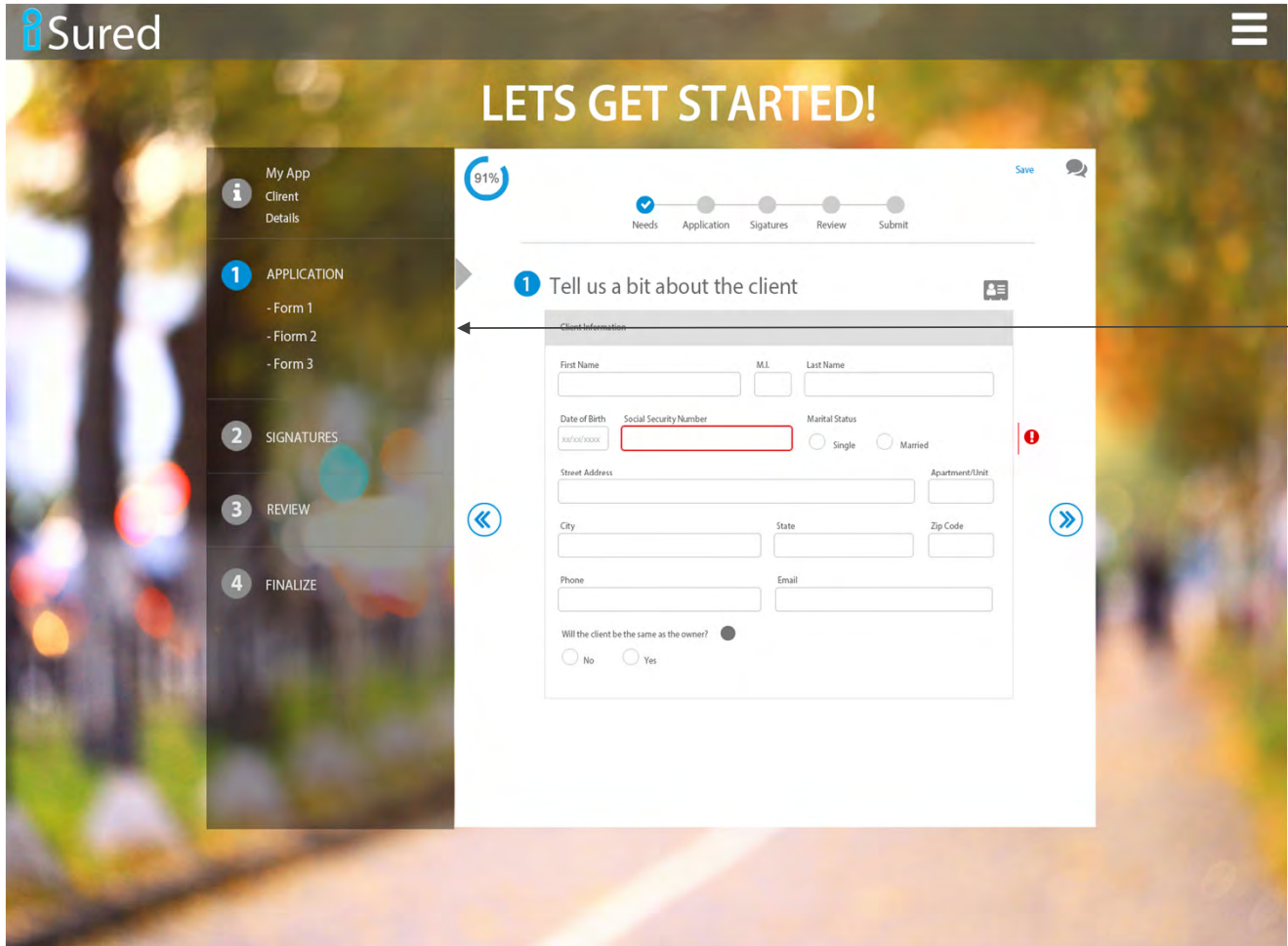
# FL Wizard – Navigation



Collapsed left nav menu – click on any symbol to expand.



# FL Forms – Navigation



Consistent style navigation for Forms based view

Forms listed – may need to be scrollable area (max # forms in view at one time).

Arrows could still be used to go back and forth between forms if buttons not in functionality.

# FL Wizard – Reflexive Questions

Application - John Smith

Home Other Actions Save Log Off

1 QUESTIONS 99% 2 SIGNATURES 3 REVIEW 4 FINALIZE CONTINUE

New Annuity Insurance Application

Owner Beneficiary Needs Personal Info Product Review & Sign

1 Who will be the Owner?

What type of ownership plan will this be?

Individual  Joint  Qualified  Custodian  Trust

Tell us about the Owner

First Name M.I. Last Name

Date of Birth Social Security Number Marital Status

Street Address Apartments/Unit

City State Zip Code

Phone Email

Is the annuitant same as owner?

No  Yes

Next

Questionnaire subway indicates progress

Based upon the selection of ownership/plan type above, the owner information fields will change.

# FL Wizard – Reflexive Questions

Application - John Smith

Home Other Actions Save Log Off

1 QUESTIONS 99% 2 SIGNATURES 3 REVIEW 4 FINALIZE CONTINUE

New Annuity Insurance Application

Owner Beneficiary Needs Personal Info Product Review & Sign

1 Who will be the Owner?

What type of ownership plan will this be?

Individual  Joint  Qualified  Custodian  Trust

Tell us about the Owner

Non-Individual Owner Name

First Name M.I. Last Name

Tax ID/Social Security Number Date Established

Street Address Apartment/Unit

City State Zip Code

Phone Email

Next

Based upon the selection of Type, The owner information fields will change.

# FL Wizard – Reflexive Questions

Application - John Smith

Home Other Actions Save Log Off

1 QUESTIONS 99% 2 SIGNATURES 3 REVIEW 4 FINALIZE CONTINUE

New Annuity Insurance Application

Owner Beneficiary Needs Personal info Product Review & Sign

1 Who will be the Owner?

What type of ownership plan will this be?

Individual  Joint  Qualified  Custodian  Trust

Tell us about the Owner

Non-Individual Owner Name  Info dialog...

First Name  M.I.  Last Name

Tax ID/Social Security Number  Date Established

Street Address  Apartment/Unit

City  State  Zip Code

Phone  Email

Next

Information on fields will be available through Info dialogs (hover/touch)